Existing Client Process

Use this resource in conjunction with the *Existing Client Flowchart*. This resource outlines the series of mailings, phone calls and meetings that we recommend when rebranding with an existing client.

- Each of the phases below will be covered in subsequent strategies.
- Carefully consider making any changes to this proven process. Skipping steps or altering order may detract from your result.
- If you work with existing clients at a distance, this process will still work.
    a. Instead of meeting face-to-face, you will meet over the phone or via videoconference.
    b. Use a courier (FedEx, UPS) or email to deliver materials such as the Agendas, Personal Financial Organizer, etc.

The Steps for Existing Clients are:

Pre-Appointment

1. Use the Advisor Pre-Booking Script to create awareness, understanding and enthusiasm with your top clients before the Assistant calls to book the meeting.
2. Use the *1st Appointment Booking Script* to arrange the 1st Appointment with the client.
3. FedEx/Ups the *Introduction Kit* to the client.
    a. Use the *Kit Cover Letter* and *Handwritten Greeting Card* with the *Introduction Kit*.
4. Mail the *1st Appointment Confirmation Letter & Checklist*.
5. Use the *1st Appointment Confirmation Call* to confirm the 1st Appointment.

1st Appointment

6. Conduct the 1st Appointment using the *1st Appointment Agenda, 1st Appointment Script, What's Important to You, PFO Sample* and your financial data-gathering tool.

2nd Appointment

7. Use the *2nd Appointment Confirmation Call* to confirm the 2nd Appointment.
8. Conduct the 2nd Appointment using the *2nd Appointment Agenda, 2nd Appointment Script* and present the *PFO Binder.*

Existing Client Welcome

9. Mail the *Welcome Card*.
10. Mail the *Welcome Letter*.
11. Send the *Welcome Gift*.